



# Boone County/City of Columbia *Reporting Instructions*

## Boone County

- ❖ Children's Services Funding
- ❖ Community Health Funding
- ❖ 2014-2016 Social Services Funding Contracts

## City of Columbia

- ❖ Social Services Funding

## Table of Contents

Introduction.....	2
Section 1: Accessing the System .....	2
Section 2: Completing and Submitting Reports.....	3
Section 3: Helpful Tips.....	11

## Contact Information

For questions or to report technical difficulties, please contact:

<b>Boone County</b>	Boone County Community Services 573.886.4298 <a href="mailto:communityservices@boonecountymo.org">communityservices@boonecountymo.org</a> <a href="http://www.showmeboone.com/communityservices">www.showmeboone.com/communityservices</a>
<b>City of Columbia</b>	Division of Human Services 573.874.7488 <a href="mailto:humanservices@gocolumbiamo.com">humanservices@gocolumbiamo.com</a> <a href="http://www.gocolumbiamo.com">www.gocolumbiamo.com</a> (search: Human Services)

# Introduction

The Boone County Community Services Department and the City of Columbia Division of Human Services utilize a web-based funding management system through which reports for City and County social services contracts must be submitted. These instructions are intended to assist organizations in submitting social services contract reports to the City and County, utilizing the web-based funding management system.

## Section 1: Accessing the System

Currently the City and County utilize Apricot by CTK® (Apricot) as a joint funding management system. To access the system:

1. Click on or copy and paste the following link to their internet web browser (preferably Google Chrome): <https://ctk.apricot.info/auth>

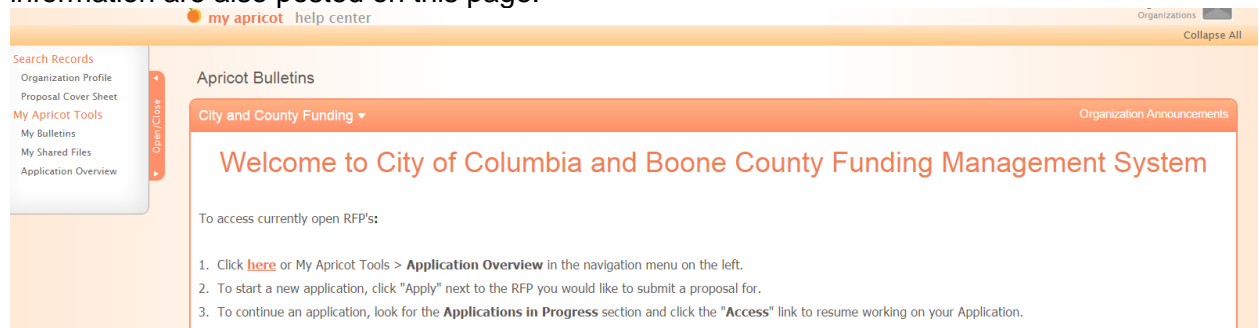
### PLEASE NOTE

Users **MUST** access the system using either Google Chrome (recommended) or Mozilla Firefox as the internet browser.

2. Enter Username and Password.

The image shows the Apricot login interface. At the top is the Apricot logo with the tagline "by ctk | software for nonprofits". Below the logo is a "Server/Location" dropdown menu currently set to "Apricot.info (US)". Underneath are two input fields: "yourname@email.com" for the username and "Password" for the password. A "Login to Apricot" button is positioned below the password field. To the right of the button is a link that says "Forgot Your Password?". At the very bottom, in small text, it says "Copyright © 2007 Community TechKnowledge".

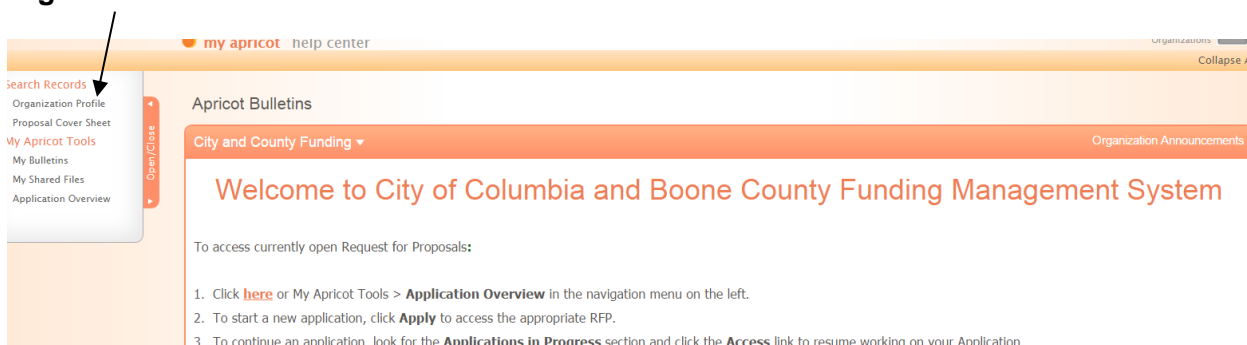
3. Once you are logged in, you will be navigated to your **MY Apricot** page. This is one of the main pages users will utilize in navigating the system. Bulletins containing important information are also posted on this page.

The image is a screenshot of the "my apricot" dashboard. The top navigation bar includes "my apricot" and a "help center" link. On the right side of the bar are links for "Organizations" and "Collapse All". A left-hand sidebar menu contains links for "Search Records" (Organization Profile, Proposal Cover Sheet), "My Apricot Tools" (My Bulletins, My Shared Files, Application Overview), and a "Open/Close" toggle. The main content area is titled "Apricot Bulletins" and features a "City and County Funding" dropdown. Below this, a large orange banner reads "Welcome to City of Columbia and Boone County Funding Management System". Underneath the banner, it says "To access currently open RFP's:" followed by a numbered list: 1. Click [here](#) or My Apricot Tools > **Application Overview** in the navigation menu on the left. 2. To start a new application, click "Apply" next to the RFP you would like to submit a proposal for. 3. To continue an application, look for the **Applications in Progress** section and click the "Access" link to resume working on your Application.

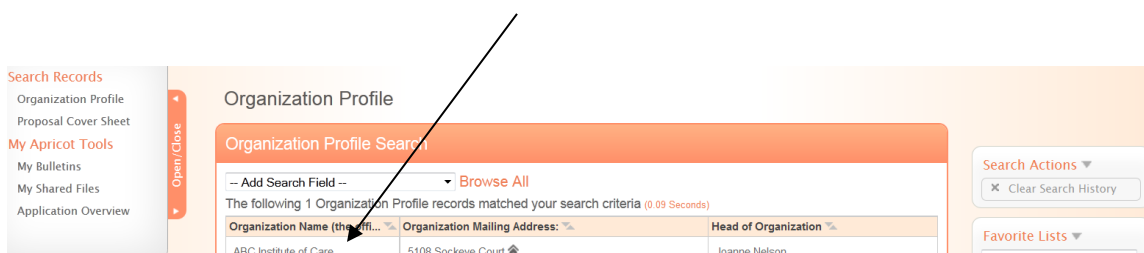
## Section 2: Completing and Submitting Reports

### Step 1: Update Your Organization Profile

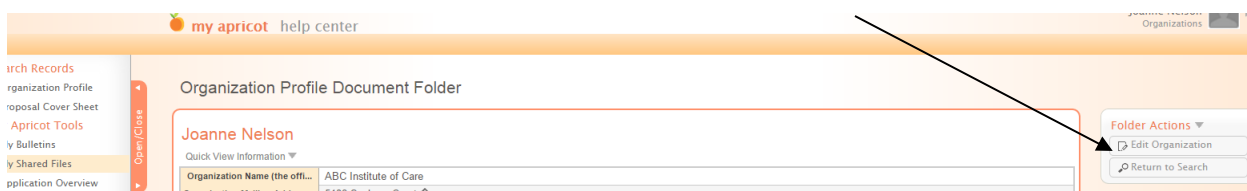
- a. In the navigation menu on the left side of the screen, click on **Search Records: Organization Profile**.



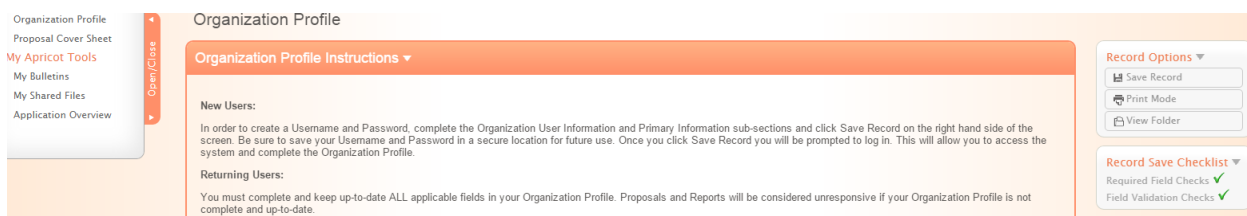
- b. This will navigate you to your **Organization Profile Folder** which contains an **Organization Profile Search** section in which your organization name is listed. Click on your organization's name.



- c. This will navigate you to your **Organization Profile Document Folder**. Click on **Edit Organization** in the **Folder Actions** box to access your **Organization Profile**.



- d. Complete and update ALL applicable fields in your **Organization Profile**. Reports will be considered unresponsive if the **Organizational Profile** is not complete and up-to-date.



Be sure to update each governing board and advisory board member by clicking on and opening the record for each board member as complete information for each member is not displayed in the board member quick view in your **Organization Profile**.

**Governing Board**

Length of Board Term (e.g. "2 years"): 3 years

Organization Governing Board:  
Include information for all board members. Click +New to add board member information.

**Governing Board Member**

Name	Board Position	Current Board Term Begin Date	Current Board Term End Date	Address	Link Info
Brian Treese	Mayor	04/05/2016	04/05/2018		Added on 06/17/2016
Daniel Atch	Presiding Commissioner				Added on 06/05/2015
Janet Thompson	District II Commissioner				Added on 06/05/2015
Karen Miller	District I Commissioner				Added on 06/05/2015
Beth Peters	Ward 6 Council Member				Added on 06/05/2015
Laura Houser	Ward 5 Council Member				Added on 06/05/2015
Ian Thomas	Ward 4 Council Member				Added on 06/05/2015
Karl Skale	Ward 3 Council Member				Added on 06/05/2015
Michael Trapp	Ward 2 Council Member				Added on 06/05/2015
Clyde Ruffin	Ward 1 Council Member				Added on 06/05/2015

Total Active Links: 10, Total Deactivated Links: 1, Current Active Links: 10, Current Deactivated Links: 1

After clicking on a board member, the board member record will display in a pop-up window. This will allow you to complete all of the board member information. Click **Save Linked Record** under **Record Options** as you complete these fields and when it is complete.

**Governing Board Member**

**Main**

\*Name: Brian Treese

Board Position: Mayor

Current Board Term Begin Date: 04/05/2016

Current Board Term End Date: 04/05/2018

Total Years Served on Board: 0

Board Compensation: \$9,000.00

Address:

Phone:

Email: mayor@comogov

Employer: Treese/Phillips, LLC

What expertise, experience and/or qualifications does this board member contribute?  
Brian Treese graduated from the University of Missouri-Columbia. He is an advocate for economic development projects, transportation needs, healthcare providers, law enforcement issues, energy and environmental issues. He is also Chairman of the Downtown Leadership Council and has served as Chairman of the City of Columbia's Historic Preservation Commission in the past.

**Record Options**

Save Linked Record

Save Full Record

Cancel

**Record Save Checklist**

Required Field Checks: ✓

Field Validation Checks: ✓

**Last Saved**

06/17/2016 9:22 AM CDT  
Columbia River Coast  
ORG

- e. To save the information you have entered in your **Organization profile**, click **Save Record** under **Record Options** as you complete these fields and when it is complete.

**Organization Profile**

Organization Profile Instructions

**New Users:**  
In order to create a Username and Password, complete the Organization User Information and Primary Information sub-sections and click Save Record on the right hand side of the screen. Be sure to save your Username and Password in a secure location for future use. Once you click Save Record you will be prompted to log in. This will allow you to access the system and complete the Organization Profile.

**Returning Users:**  
You must complete and keep up-to-date ALL applicable fields in your Organization Profile. Proposals and Reports will be considered unresponsive if your Organization Profile is not complete and up-to-date.

**Record Options**

Save Record

Print Mode

View Folder

**Record Save Checklist**

Required Field Checks: ✓

Field Validation Checks: ✓

## REMINDER

All applicable fields in the **Organization Profile** must be complete and up to date before submitting a report. Reports will be considered nonresponsive if any applicable fields are incomplete.

## Step 2: Access Report Forms

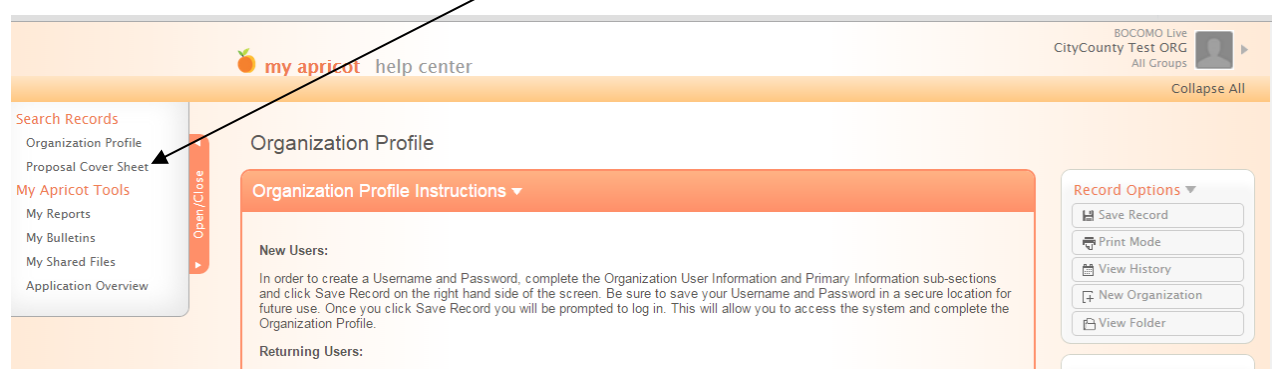
There are currently two types of report forms in the system:

- **Report Forms**
  - Interim Report (POS and PILOT)
  - Modified Interim Report (POS and PILOT)
  - Year End Report (POS and PILOT)
- **Legacy Report forms**
  - Mid-Contract Report
  - Final Report

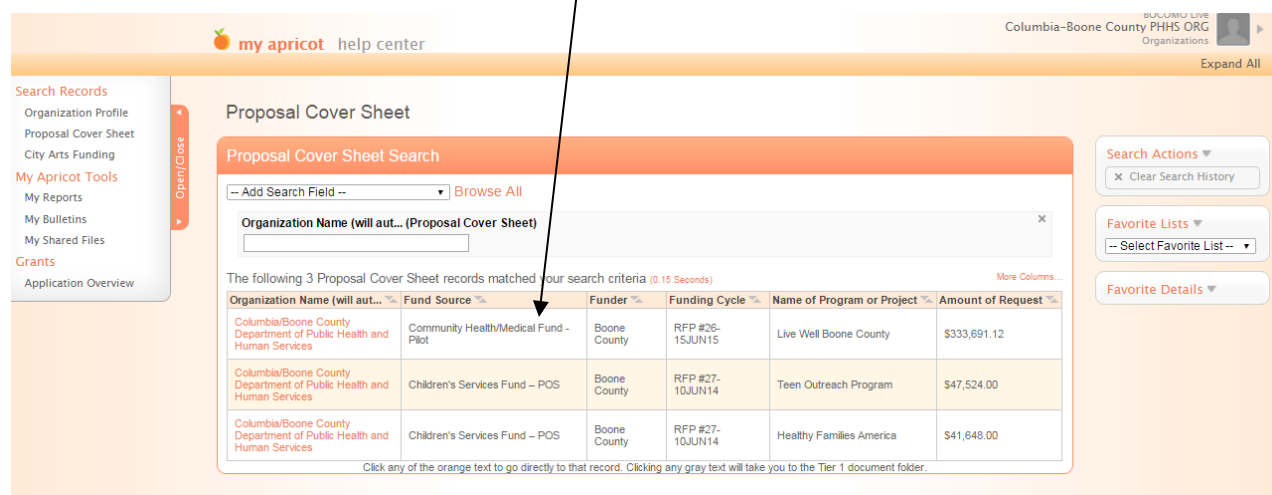
Instruction for accessing both types of forms are outlined below.

### Report Forms

- To access Report forms, navigate back to the **Proposal Cover Sheet Folder**. You can do this by simply clicking **Proposal Cover Sheet** in **Search Records** on the left side of your screen.



- In the **Proposal Cover Sheet Search Page**, click on the cover sheet for the contracted proposal for which you would like to complete a report.



- c. This will open the Proposal Cover Sheet Document Folder which contains all of the forms from the applicable proposal, including the report forms. Click any of the fields in the quick view row of the report you would like to open and complete.

my apricot help center Columbia-Boone County PHHS ORG Organizations Collapse All

Search Records  
Organization Profile  
Proposal Cover Sheet  
City Arts Funding  
My Apricot Tools  
My Reports  
My Bulletins  
My Shared Files  
Grants  
Application Overview

Proposal Cover Sheet Document Folder

Columbia/Boone County Department of Public Health...

Quick View Information ▶

Additional Documents

Program Budget (1 records) ▼

TOTAL REVENUE %	Z. %	TOTAL EXPENSES %	Complete
669453.13	\$179,400.00	659453.13	✓

Page 1 of 1 | 20 records per page

Program Overview (1 records) ▼

Record Lock %	a. Will program consumers be charged a fee for the proposed program service(s)? %	b. Will the program utilize a sliding fee schedule?	Complete
✓	No		✓

Page 1 of 1 | 20 records per page

Consumer Demographics (1 records) ▼

Boone County (includes City of Columbia residents) %	Complete
25999	✓

Page 1 of 1 | 20 records per page

Pilot Program Performance Measures (1 records) ▼

Record Lock %	Program Service (1) (500 character limit) %	Complete
✓	Live Well by Faith church-based health promotion (CBHP) intervention	✓

Page 1 of 1 | 20 records per page

Interim Pilot Report (1 records) ▼

Organization Name %	Program Name %	Funding Cycle %	Complete
Columbia/Boone County Department of Public Health and Human Services	Live Well Boone County	RFP #26-15JUN15	✗

Page 1 of 1 | 20 records per page

Folder Actions ▼

- Edit Proposal Cover
- Return to Search
- Application Overview
- Print Records
- Record History

Grant Actions ▼

- Submit Interim Pilot
- Required Forms ✓
- Required Fields ✗
- Interim Pilot Report

- d. This will open the report form.

my apricot help center Columbia-Boone County PHHS ORG Organizations Collapse All

Search Records  
Organization Profile  
Proposal Cover Sheet  
City Arts Funding  
My Apricot Tools  
My Reports  
My Bulletins  
My Shared Files  
Grants  
Application Overview

Interim Pilot Report

Columbia/Boone County Department of Public Health...

Quick View Information ▶

Click Add to link to the Proposal Cover Sheet for this program application to automatically populate proposal information.

\*Link to Proposal Cover Sheet

Hide Deactivated Links Add

Proposal Cover Sheet	Fund Source %	Funder %	Funding Cycle %	Name of Program or Project %	Link Info
Columbia/Boone County Department of Public Health and Human Services	Community Health/Medical Fund - Pilot	Boone County	RFP #26-15JUN15	Live Well Boone County	Active Date Added on 06/30/2016

Total Active Links:1, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

\*Organization Name

Columbia/Boone County Department of Public Health and Human Services

Program Name

Live Well Boone County

Funder

Boone County

Funding Type

Community Health/Medical Fund - Pilot

Funding Cycle

RFP #26-15JUN15

County Children's Services - Service Type

Funding Cycle

Up to thirty days of temporary shelter for abused, neglected, runaway, homeless or emotionally disturbed youth

Respite care services

Unmarried parent services

Outpatient chemical dependency and psychiatric treatment programs

Counseling and related services as a part of transitional living programs

Home-based and community-based family intervention programs

Prevention programs which promote healthy lifestyles among children and youth and strengthen families

Crisis intervention services, inclusive of telephone hotlines

Individual, group, or family professional counseling and therapy services

Record Options

- Save Record
- Print Mode
- View History
- View Folder

Record Save Checklist

Required Field Checks ✗

- \*Upload Accounting of Funds...
- \*1. Describe any significant...
- \*2. Describe any significant...
- \*3. Describe any significant...
- \*4. Briefly describe any co...
- \*5. Describe any partnershi...
- \*6. How was the program pu...
- \*7. How was feedback from...
- \*1.1. Is the program on tra...
- \*1.2. If applicable, is the...
- \*1.3. Is the program on tra...

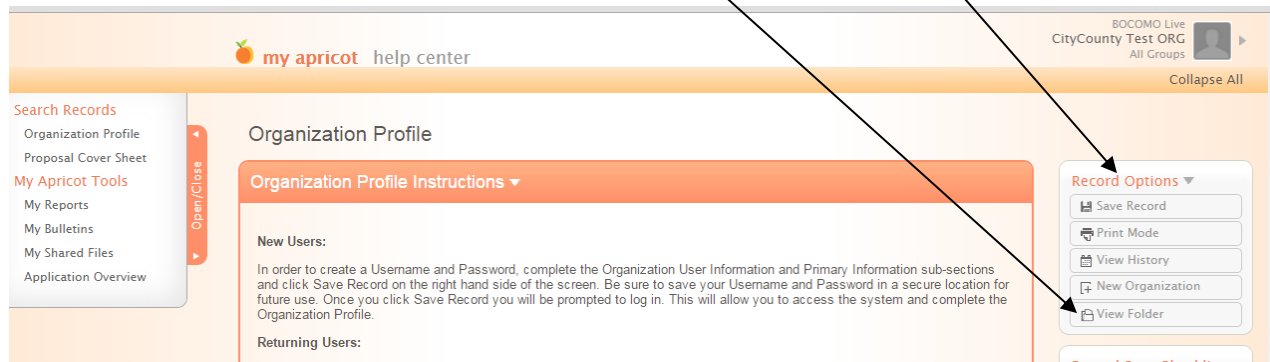
Field Validation Checks ✓

Last Saved

06/30/2016 4:13 PM CDT  
Joanne CC Nelson

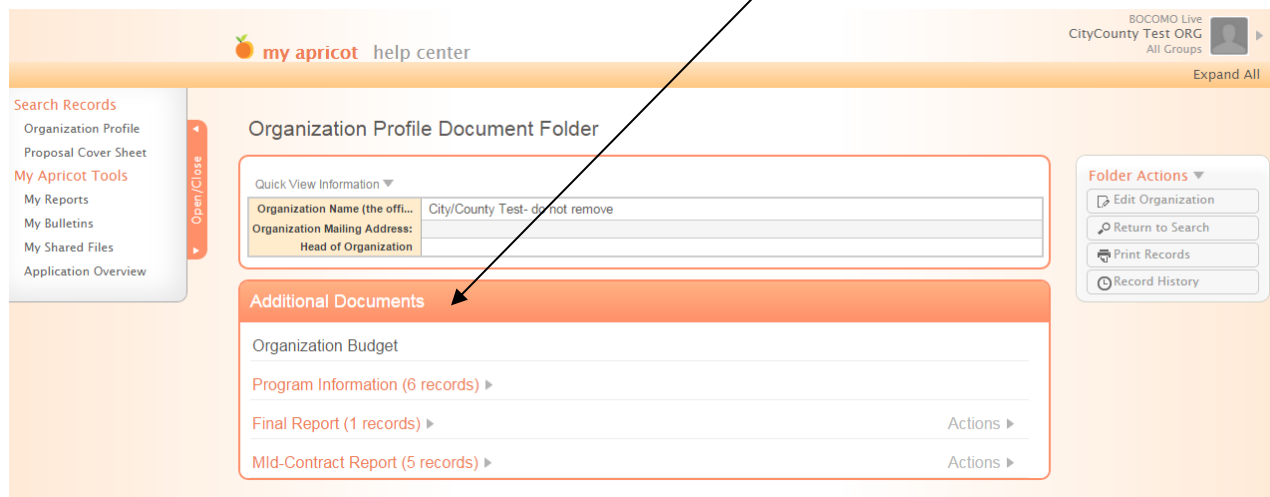
## Legacy Report Forms

- To access Legacy Report forms, navigate back to the **Organization Profile Document Folder**. You can do this by simply clicking **View Folder** in the **Record Options** on the right side of your **Organization Profile**.

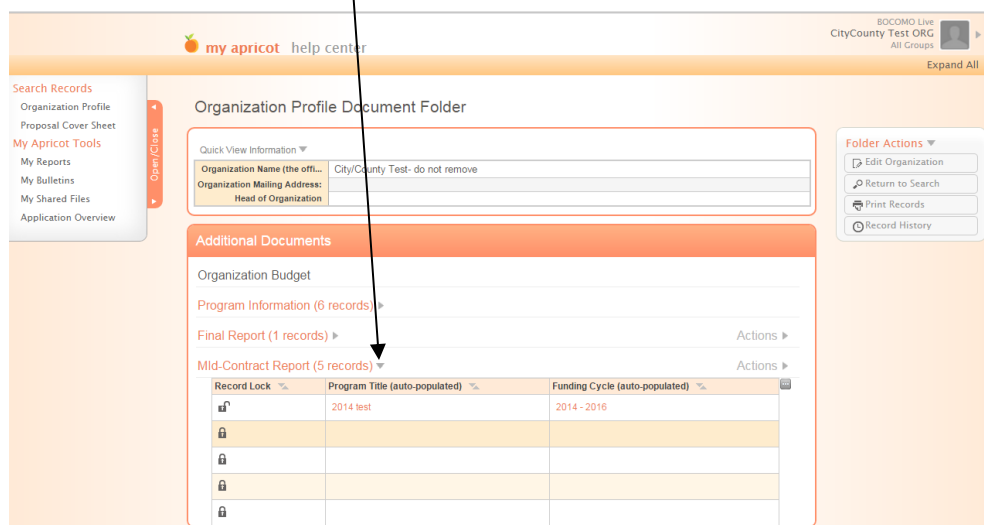


Or you can repeat steps a-c in Step 1.

- In the **Organization Profile Document Folder**, you are able to view and access the report forms. They are located under the **Additional Documents** section.



- Click on the small gray arrow next to the type of report (Mid-Contract or Final) you would like to access. This will open a list of your report forms of that type.



- d. The report(s) that you need to complete and submit have already been created for you. They can be identified by the **Program Title**, **Funding Cycle**, and **Reporting Year**.

my apricot help center

CityCounty Test ORG All Groups Expand All

Search Records  
Organization Profile  
Proposal Cover Sheet  
City Arts Funding  
My Apricot Tools  
My Reports  
My Bulletins  
My Shared Files  
Grants  
Application Overview

Organization Profile Document Folder

Quick View Information ▾  
Organization Name (the offi... City/County Test- do not remove  
Organization Mailing Address: Head of Organization

Folder Actions ▾  
Edit Organization  
Return to Search  
Print Records  
Record History

Additional Documents

Organization Budget

Program Information (6 records) ▶

Final Report (1 records) ▶

Mid-Contract Report (5 records) ▾

Program Title (auto-populated) %	Funding Cycle (auto-populated) %	Reporting Year %
2014 test	2014 - 2016	2015
		2010
		2010
		2013
		2014

Page 1 of 1 | 20 records per page

Archive - Agency Information (4 records) ▶

- e. You can also see the **Record Lock** if you click on the “expand” button. Current reports will be unlocked.

my apricot help center

CityCounty Test ORG All Groups Expand All

Search Records  
Organization Profile  
Proposal Cover Sheet  
City Arts Funding  
My Apricot Tools  
My Reports  
My Bulletins  
My Shared Files  
Grants  
Application Overview

Organization Profile Document Folder

Quick View Information ▾  
Organization Name (the offi... City/County Test- do not remove  
Organization Mailing Address: Head of Organization

Folder Actions ▾  
Edit Organization  
Return to Search  
Print Records  
Record History

Additional Documents

Organization Budget

Program Information (6 records) ▶

Final Report (1 records) ▶

Mid-Contract Report (5 records) ▾

Program Title (auto-populated) %	Funding Cycle (auto-populated) %	Reporting Year %	Record Lock %
2014 test	2014 - 2016	2015	🔒
		2010	🔒
		2010	🔒
		2013	🔒
		2014	🔒

Page 1 of 1 | 20 records per page

Archive - Agency Information (4 records) ▶



- f. Click any of the fields in the quick view row of the report you would like to open and complete.

my apricot help center

BOCOMO Live  
CityCounty Test ORG  
All Groups  
Expand All

Search Records  
Organization Profile  
Proposal Cover Sheet  
My Apricot Tools  
My Reports  
My Bulletins  
My Shared Files  
Application Overview

Organization Profile Document Folder

Quick View Information ▾

Organization Name (the offi... CityCounty Test- do not remove

Organization Mailing Address: Head of Organization

Folder Actions ▾

Edit Organization  
Return to Search  
Print Records  
Record History

Additional Documents

Organization Budget

Program Information (6 records) ▾

Final Report (1 records) ▾ Actions ▸

Mid-Contract Report (5 records) ▾ Actions ▸

Record Lock	Program Title (auto-populated)	Funding Cycle (auto-populated)	Reporting Year	Additional Information
🔒	2014 test	2014 - 2016	2015	
🔒			2010	
🔒			2010	
🔒			2013	
🔒			2014	

- g. This will open the report form.

my apricot help center

BOCOMO Live  
CityCounty Test ORG  
All Groups  
Expand All

Search Records  
Organization Profile  
Proposal Cover Sheet  
My Apricot Tools  
My Reports  
My Bulletins  
My Shared Files  
Application Overview

Mid-Contract Report

Quick View Information ▸

General Program Information1 ▾

Link to Program Information

Hide Deactivated Links Add

Program Information	Link Info
Program Title: ▾ Issue Area: ▾ Funding Cycle: ▾ Record Lock ▾	Active ▾ Date ▾
2014 test Basic Needs and Emergency Services 2014-2016 🔒	☑ Added on 07/02/2015

Total Active Links:1, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

Program Title (auto-populated) 🔒

2014 test

Issue Area (auto-populated) 🔒

Basic Needs and Emergency Services ▾

Funding Cycle (auto-populated) 🔒

2014 - 2016 ▾

Service Category (auto-populated) 🔒

Basic Needs and Emergency Services ▾

\*Reporting Year

2015 ▾

Record Options ▸

Save Record  
Print Mode  
View History  
New Mid-Contract  
View Folder

Record Save Checklist ▸

Required Field Checks ✓  
Field Validation Checks ✓

Last Saved ▸

07/02/2015 12:42 PM CDT  
Steve CC Hollis

## Step 3: Complete Report Forms

- a. Once you have opened the report form, you will note that some fields in the report form have been auto-populated. You cannot edit these fields.

The screenshot displays the 'Mid-Contract Report' form. On the left is a sidebar with navigation links: Organization Profile, Proposal Cover Sheet, My Apricot Tools, My Reports, My Bulletins, My Shared Files, and Application Overview. The main content area is titled 'Mid-Contract Report' and includes a 'Quick View Information' link. Below this is the 'General Program Information1' section. It contains a 'Link to Program Information' table with columns for Program Information and Link Info. The table has one row with the following data: Program Title: 2014 test, Issue Area: Basic Needs and Emergency Services, Funding Cycle: 2014-2016, Record Lock: (locked icon), Active: (checked), Date: Added on 07/02/2015. Below the table, several fields are auto-populated and marked with a lock icon: Program Title (auto-populated) 2014 test, Issue Area (auto-populated) Basic Needs and Emergency Services, Funding Cycle (auto-populated) 2014 - 2016, Service Category (auto-populated) Basic Needs and Emergency Services, and Reporting Year 2015. On the right side, there are 'Record Options' (Save Record, Print Mode, View History, New Mid-Contract, View Folder), a 'Record Save Checklist' (Required Field Checks, Field Validation Checks), and a 'Last Saved' timestamp (07/02/2015 12:42 PM CDT, Steve CC Hollis). An arrow points from the text in step 'a' to the auto-populated fields.

- b. Be sure to complete all of the applicable fields in the report which are not auto-populated.

This screenshot shows the lower portion of the 'Mid-Contract Report' form. It includes an 'Additional Information(for DHS use only)' section with a text input field. Below this is the 'Program Service Period and Program Reporting Period' section, which has three radio button options: Year-Round January 1 - June 30 (due by July 31), Summer June 1 - June 30 (due by July 31), and School Year January 1 - June 30 (due by July 31). The 'Funding Source' section has two checkboxes: City of Columbia and Boone County. The 'Mid-Contract Report Narrative1' section follows, with a heading 'Innovation, Quality Improvement, and Collaboration' and a prompt to describe activities. Below this is a list of bullet points: New and innovative program/service techniques and/or activities, New staff training initiatives, The adoption of best practices, and New and/or enhanced community collaborations. There are two text input fields for 'Innovation, Quality Improvement, and Collaboration (600 char. limit)' and 'Significant Changes (600 char. limit)'. The right sidebar is identical to the previous screenshot. An arrow points from the text in step 'b' to the narrative text input field.

- c. To save the information you have entered in your report, click **Save Record** under **Record Options** as you work on completing the fields and when it is complete.

The screenshot shows the 'Mid-Contract Report' interface. On the right, the 'Record Options' sidebar is visible, containing buttons for 'Save Record', 'Print Mode', 'View History', 'New Mid-Contract', and 'View Folder'. Below these are 'Record Save Checklist' and 'Last Saved' information.

## Step 4: Submit Reports

To submit completed report(s), you must notify the applicable funder by e-mail.

### PLEASE NOTE

Before submitting reports, review all the fields in both the **Organization Profile** and the **Report(s)** to ensure that **ALL** applicable fields are appropriately completed.

## Section 3: Helpful Tips

1. Printing records – The ability to print is found under the **Folder Actions** box on the right-hand of the screen under **Print Records**. Follow instructions to print one or more forms.

The screenshot shows the 'Proposal Cover Sheet Document Folder' interface. On the right, the 'Folder Actions' sidebar is visible, containing buttons for 'Edit Proposal Cover', 'Return to Search', 'Application Overview', and 'Print Records'. Arrows point from the text in the list to the 'Print Records' button and the table.

2. Symbols – below are common symbols utilized in Apricot.

a. \* = Required Field

b. ▼ = Open or close viewing of forms.

c. ? = Tool Tip: If the cursor hovers over this it will information about that specific request or requirement.

d. ✓ = Green check marks indicate that a form is complete.

e. ✗ = Indicates that a form is incomplete.

f. ⋮ = Enables users to see section values in the **Additional Documents** section.